



Opinion **Dynamics**

# STATEWIDE MARKETING, EDUCATION, AND OUTREACH EVALUATION PLAN

January 8, 2019



# ME&O Research Sector Area Overview

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Deliverable	Study	Year
ME&O-1a	Cross-Cutting Marketing Effectiveness Study: Effectiveness Assessment	Years 1 - 3
ME&O-1b	Cross-Cutting Marketing Effectiveness Study: Process Assessment	Years 1 - 3
ME&O-2	ME&O Consensus Project	Year 1
ME&O-3	ME&O Program Transition from IOUs to Third Parties and CCAs	Years 2 - 3

# ME&O 1a: Cross-Cutting Marketing Effectiveness Study: Effectiveness Assessment Objectives

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- Assess the effectiveness of the SW ME&O campaign in achieving its performance metrics and meeting its objectives
- Estimate the impact of exposure to SW and PA ME&O on energy management attitudes, behaviors, and energy usage



# Effectiveness Assessment: Information Gathering

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Research Task	Timeline	Approach
ME&O Stakeholder Interviews	Q1 2019	Update our understanding of campaign objectives and activities and gain additional perspectives on progress toward goals
Ongoing Information Sharing	2019 - 2021	Hold regular meetings with SW ME&O Implementer and PA marketing teams to stay up to date on campaign activities and plans to ensure access to data and information needed to effectively and efficiently evaluate ME&O campaigns

# Effectiveness Assessment: Activities to Assess Program Performance Metrics and Campaign Objectives

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Research Task	Timeline	Approach
Residential Customer Surveys	Q1 /Q3 2019 Q1 /Q3 2020 Q1 /Q3 2021	Biannual surveys to track performance of EUC campaign against official metrics and other objectives
Small Business Customer Surveys	Q2 2019 Q2 2020 Q2 2021	Annual surveys to track performance of EUC campaign against official metrics and other objectives
Web Analytics	Q1 2020 Q1 2021 Q4 2021	Compile and assess data on the EUC web and digital campaign to track performance against official metrics

# Effectiveness Assessment: Activities to Estimate Impacts of Exposure to EUC and PA Marketing

Research Task	Timeline	Approach
Assess CBO Partnerships	2019-2021	Assess effectiveness of CBO partnerships in reaching low-income and hard-to-reach communities through GIS analysis, IDIs, event observations, and customer surveys.
Assess ME&O Impacts	2020-2021	Estimate the relative effects of different marketing content and sponsors on energy management attitudes and behaviors through experimental research on the digital campaign and advanced analytics to estimate impacts of the broader campaign on attitudes, actions, and energy use.

## ME&O1b: Process Assessment Objectives

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- Ensure that ongoing efforts at collaboration among ME&O stakeholders are effective
- Ensure that stakeholders are contributing to the collaborative process in a constructive manner
- Provide continuous feedback so that changes can be made in real-time



# Process Assessment Activities

Research Task	Timeline	Approach
Establish Evaluation Criteria	Q1 2019	Conduct interviews with CPUC and ME&O stakeholders to establish goals and measures of success to guide evaluation of collaborative process
Observation of Collaborative Process	2019-2021	Conduct observations of SW ME&O working group meetings and other interactions
Post-Collaboration Pulse Survey	2019-2021	Conduct short online feedback surveys immediately following meetings or workshops to get real-time feedback
Mid and End Cycle Evaluative Surveys	Q1 2020 Q3 2021	Conduct online surveys with all ME&O stakeholders to gather feedback on a rolling basis about the collaborative process relative the established evaluation framework
In-Depth Feedback Interviews	Q3 2021	Conduct in-depth feedback interviews at the end of the evaluation cycle with the CPUC and ME&O stakeholders to gain qualitative insights and inform quantitative survey results
Update Memo and Recommendations	Q1 2020 Q1 2021 Q4 2021	Provide ongoing feedback on the collaborative process that can be used to make adjustments. Present final recommendations at the end of the cycle for the collaborative process going forward





## ME&O 2 – Consensus Project Objectives and Activities

- Establish benchmarks related to ME&O metrics and success criteria in the energy efficiency industry
- Create a framework for the evaluation of ME&O efforts moving forward.

Research Task	Timeline	Approach
Landscape Analysis	Q1 2019	Gather and synthesize information on the existing metrics and success criteria for energy efficiency ME&O efforts, as well as other relevant social marketing campaigns. This task includes two activities: <ul style="list-style-type: none"><li>• Secondary data and literature review</li><li>• In-depth interviews with key stakeholders and industry experts</li></ul>
Delphi Study	Q2 2019	Convene a group of experts to discuss appropriate metrics and success criteria for ME&O efforts, and work toward consensus on a set of metrics and associated success criteria that can be used to measure their effectiveness moving forward
Evaluation Framework Development	Q2-Q3 2019	Work with an advisory group to establish a framework document for the evaluation of ME&O that provides actionable guidance for the assessment of statewide and program administrator efforts moving forward



## ME&O-3 – Transition to Third Parties and CCAs Objectives

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- What programs are being implemented by CCAs and third-party PAs?
- How are these programs being marketed to residential and small business consumers?
- How do the CCAs and third-party PAs coordinate with the IOUs and the statewide ME&O campaign in the implementation of their energy efficiency offerings?
- What are the implications of these changes in program delivery and marketing on the customer journey and experience?
- What lessons have been learned during the rollout of this process that can help improve the customer journey in the future?



## ME&O-3 – Transition to Third Parties and CAAs Activities

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Research Task	Timeline	Approach
Key Informant Interviews	Q3/Q4 2020	In-depth interviews with representatives from each actor in the ME&O ecosystem most knowledgeable about their organization's planned program implementation activities and in the case of the IOUs, their organization's management of and coordination with third-party PAs
Program Documentation Review	Q3/Q4 2020	Review all program implementation and marketing plans to identify the activities planned by each actor, and the potential for overlap and coordination
Systems Mapping	Q4 2020	Illustrate relationships across stakeholders and identify other potentially important relationships and interactions related to program delivery
Dyad and Triad Stakeholder Interviews	Q1/Q2 2021	Explore the status of program changes and the dynamics between each actor and others involved in ME&O efforts by conducting in-depth group interviews with key staff at each organization
Working Group Share-Out and Iteration	Q2/Q3 2021	Share synthesized findings from the stakeholder interviews with all ME&O actors to further develop themes and achieve buy-in on the final results

# Q&A / Comments

